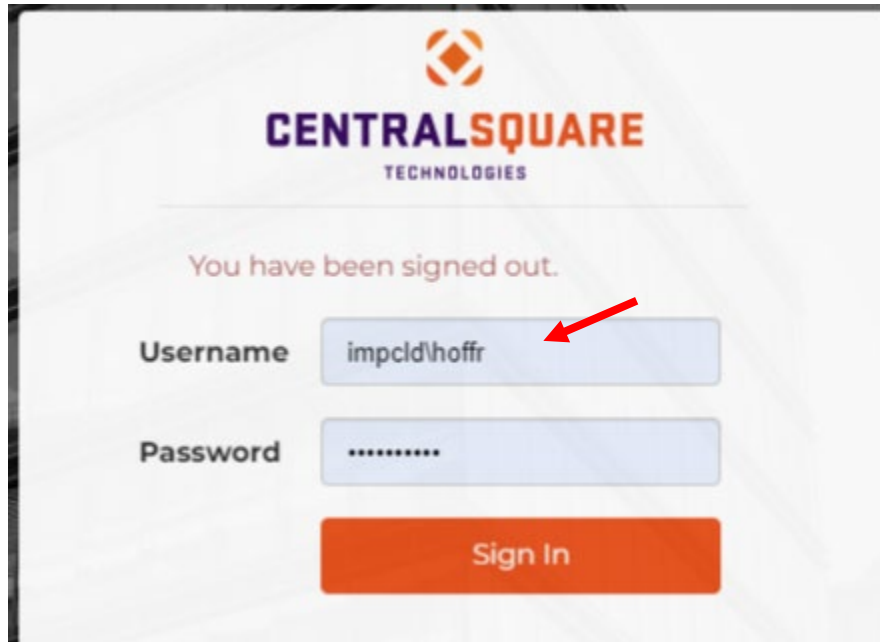# HOW TO CREATE A PURCHASE REQUEST

Your password in will be the same as it was in OneSolution, your Username will begin with impcld\ then followed by first 4 letters of last name and first letter of first name. Passwords must consist of at least 8 characters numeric and symbols can be any of the following; ! ? $. Do not use your birthdate, name or common information.
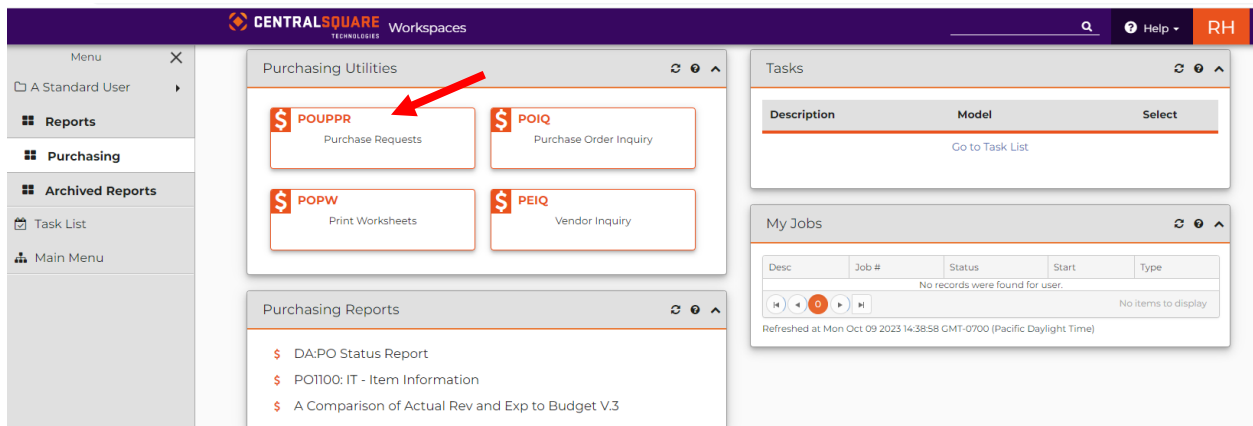
NOTE: Follow steps where the red arrow indicators are.
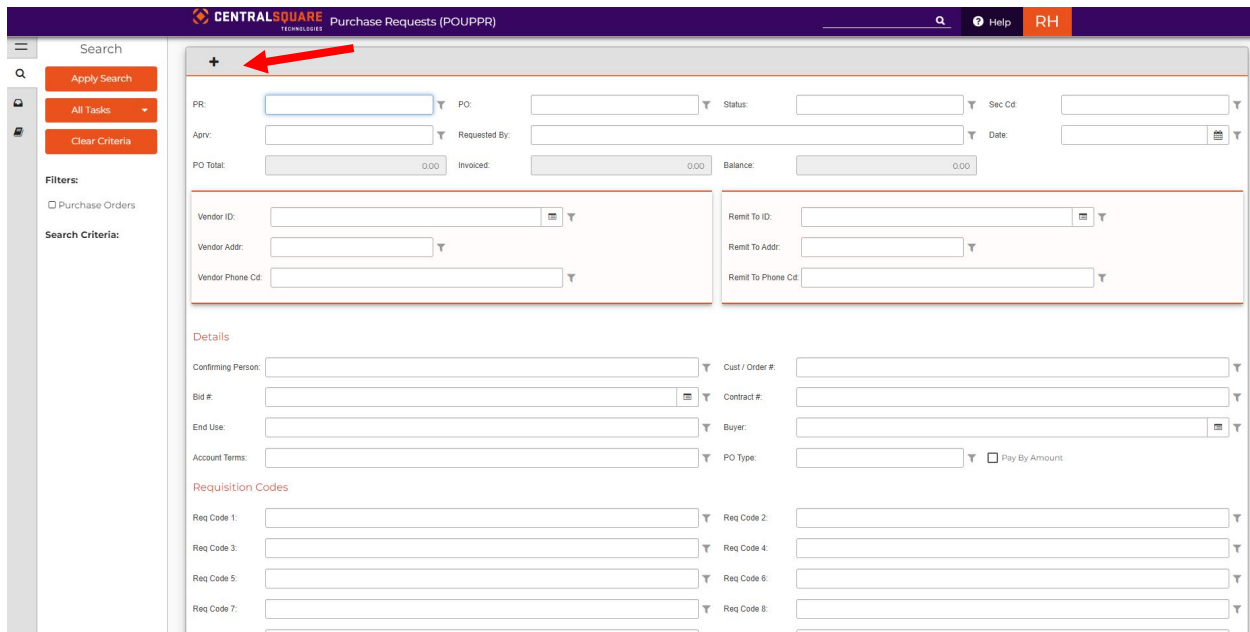
Standard User

Select POUPPR Purchase Request, click button

Curser should be in in the PR field. In the gray banner above, click the plus sign **+** . Please note all red asterisk are required fields. **PR:** *
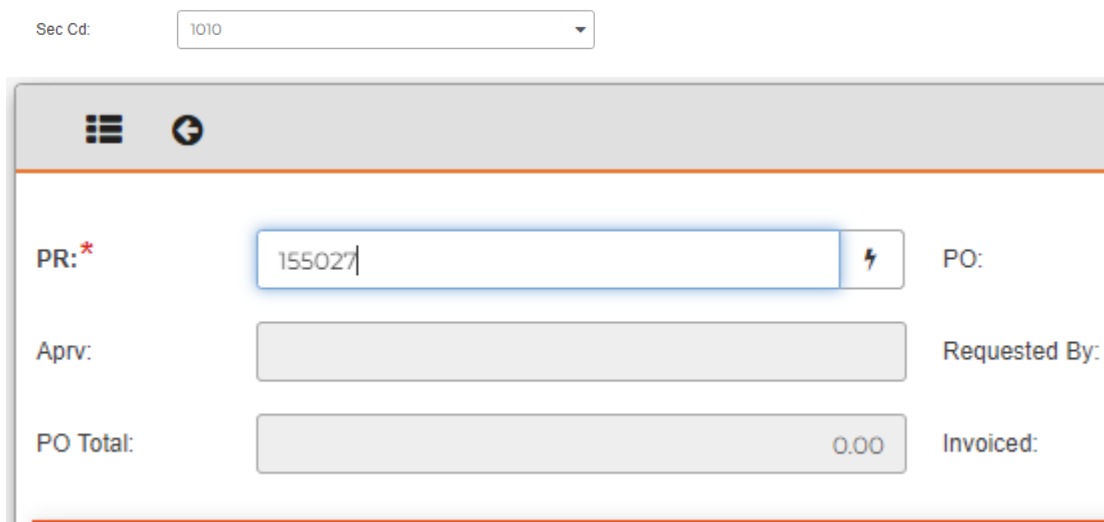

A new window will open up. The New Purchase Request number will be displayed (155027). Click the red pencil button.

This will begin the new workspace for the new Purchase Request. In the top section everything will default based on your profile. If you have multiple Organization (Org.) Key associated to your profile you will have the ability to click on the arrow button to select a different Org. key.

Vendor ID section: Click the button at the end of the field to search for the vendor name, see sample below. When searching for vendors you are still able to use the asterisk as a wild card, example * construction *, it can be used before and/or after a word.

Remit to ID Section: this will default based on your profile. Should this section needs to be changed you will click on the button ■ to make selection..

Details Section: The PO Type will default to P for Standard PO, B Blanket Order and C Contract. Select B when opening a Blanket Purchase Order.

Blanket Section; this section is used when opening new Blanket Purchase Orders. You will only need to enter the Blanket Amount, this amount is the same amount as the dollar amount you need the Blanket Purchase Order for be made out for.

Ship To Section should default to your location. Should you need the item(s) to be shipped to a different location you will need to click the button ■ to make your selection.

Ship To ID:	1010	
	PURCHASING DEPARTMENT, IC	
Ship To Addr:*	D1 ▼	
	1125 W MAIN ST	
	EL CENTRO, CA 92243	
Ship To Phone Cd:	▼	

Bill to ID will default to the Auditor Controllers Department.

Bill To ID:	1006	
	AUDITOR CONTROLLER, IC	
Bill To Addr:	D1 ▼	
	940 MAIN ST STE 108	
	EL CENTRO, CA 92243	
Bill To Phone Cd:	▼	

Product item section: this is where you will be adding the products that you are wanting to be purchased. You will need to click the pencil button. Once you click on the button the window will move back up to the top, you will need to scroll (right side of screen) back down to the bottom to enter the product information (see next page).
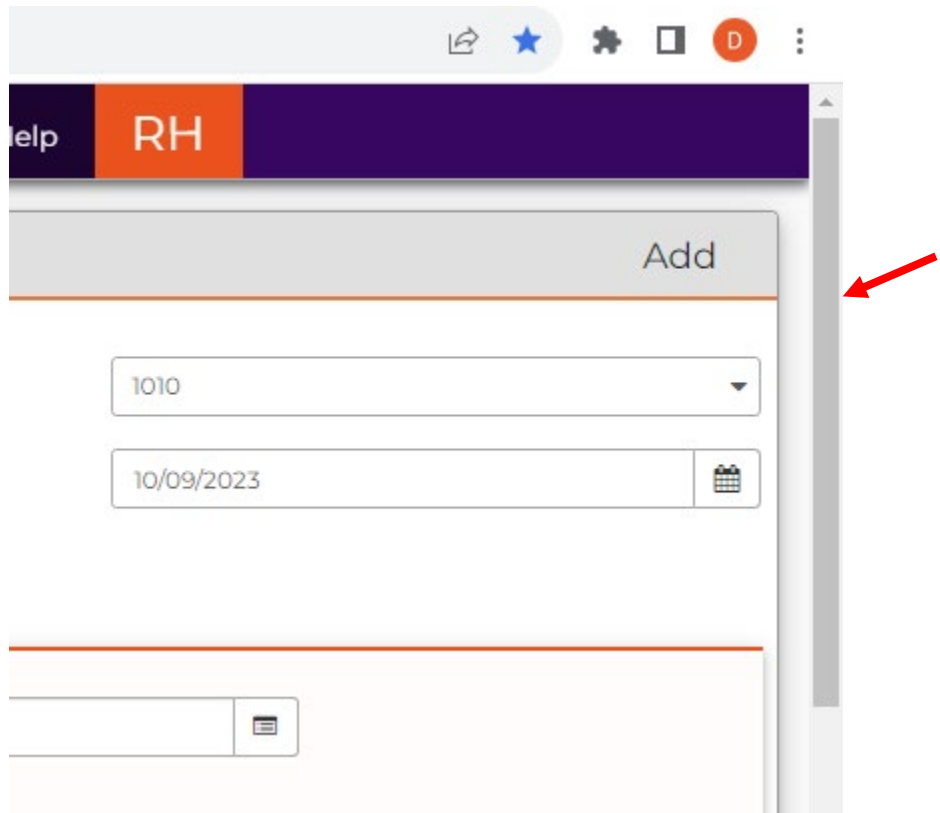
☑ ▼

✏ 0.00
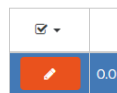
Items	Compliance	Notes	Change Orders

☑ ▼	Unit Price	Item Number *	Description *	Tax Code	
✏	0.00000	0001			EA

|◀ ◀◀ 1 ▶▶ ▶| 10 ▼

⇄ Switch to Added Records

Begin entering the product information, number of items, quantity, units, unit price and description.

| Items | Compliance | Notes | Change Orders |

Account number section: enter the Org. key and Obj. key for your department. To change from Amount to Percent click the button next to "Switch To".

To add another account number click the Add Account button, this is also known as splitting accounts.
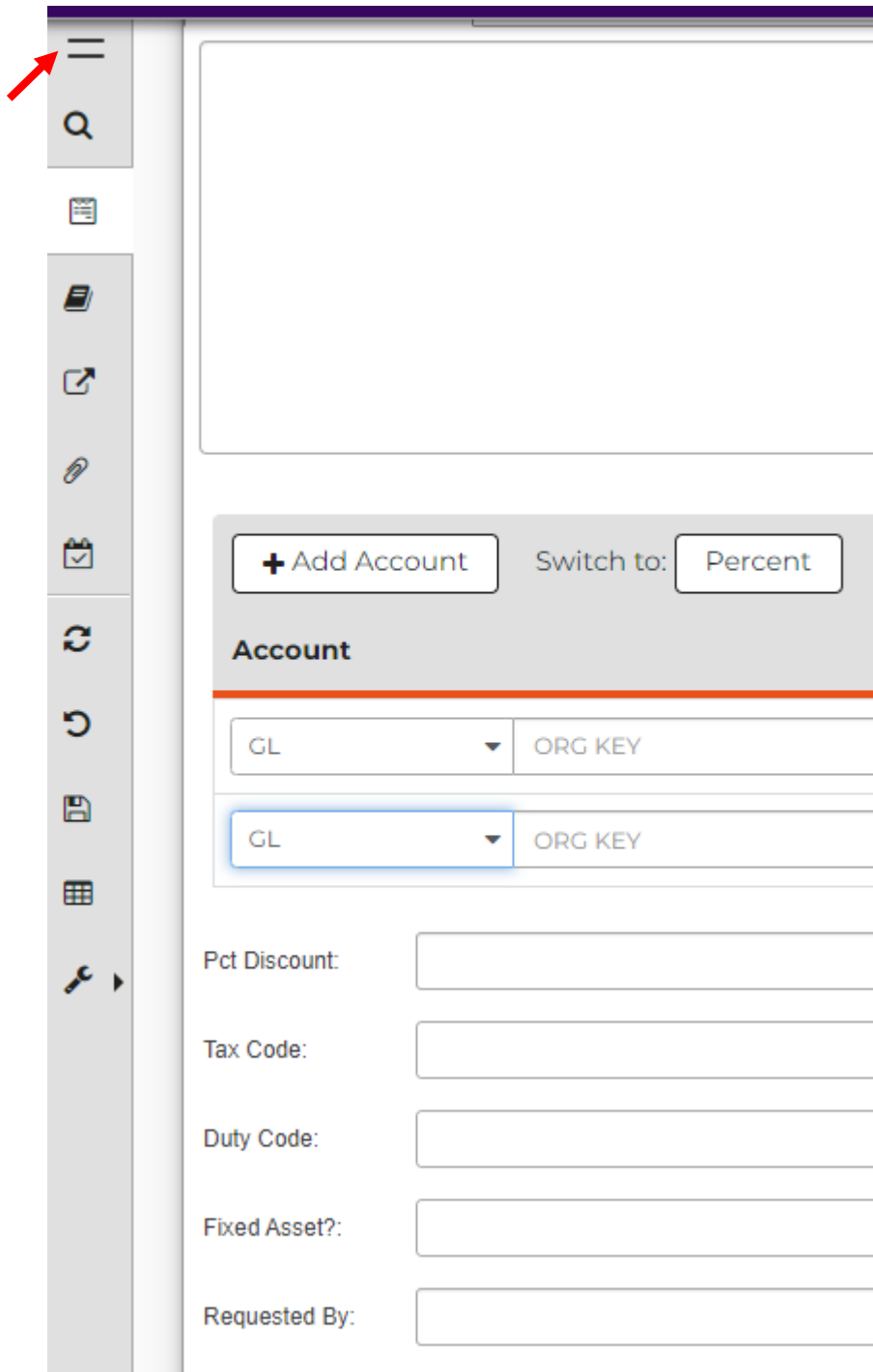
Tax Code for El Centro rate is 25% and out side city limits is 7.75%.

At any point if you want to expand the left panel, click the double line button ☰ . See next screen to see the results.

Menu expanded.

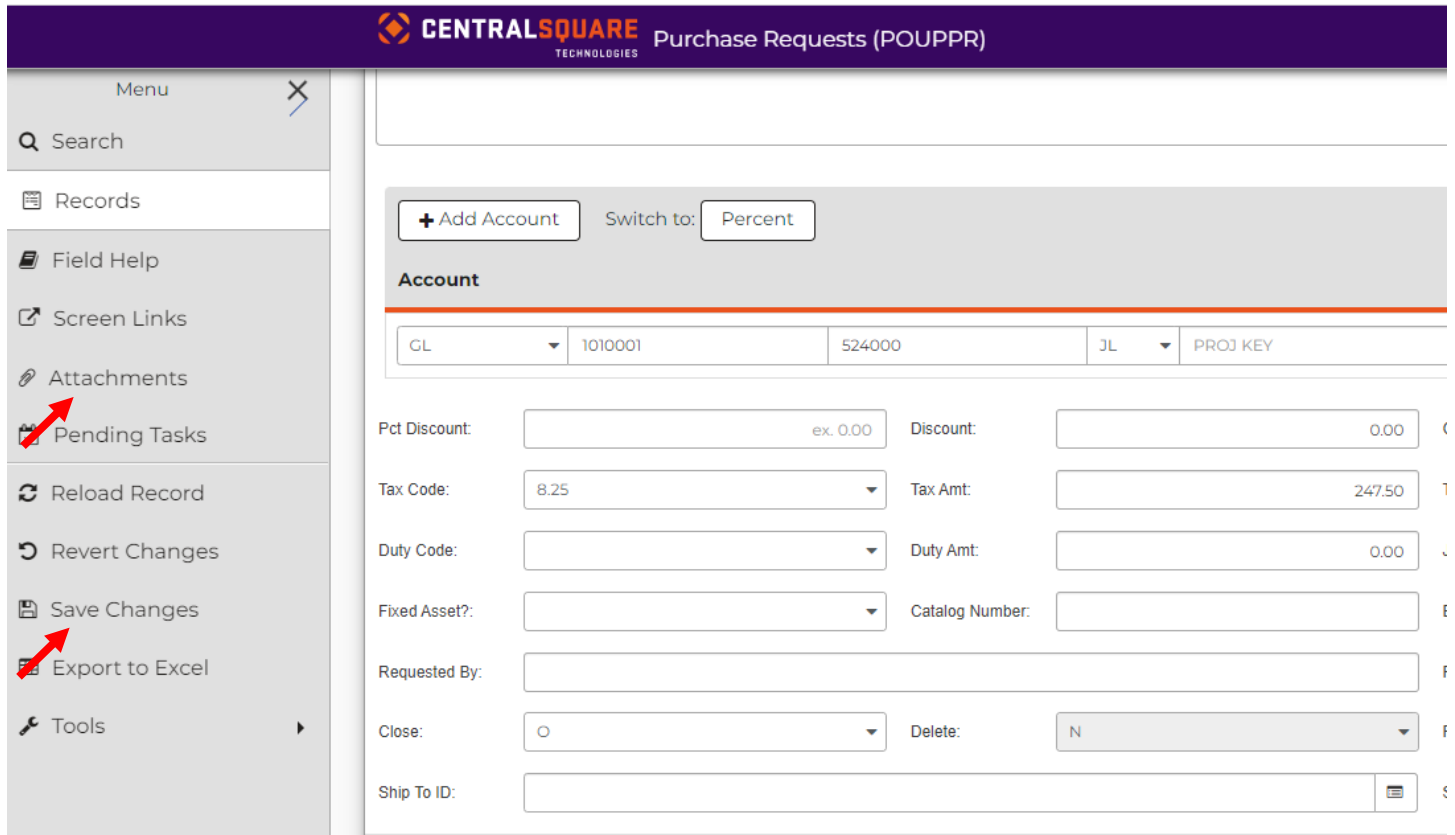To Add Attachments for your backup or supporting documents click the paper clip.

To Save your changes at any time click the 🖫 button for Save Changes. Then in the upper right corner the "Record(s) Accepted" should appear, see below green indicator, you have to click in the green box to continue.
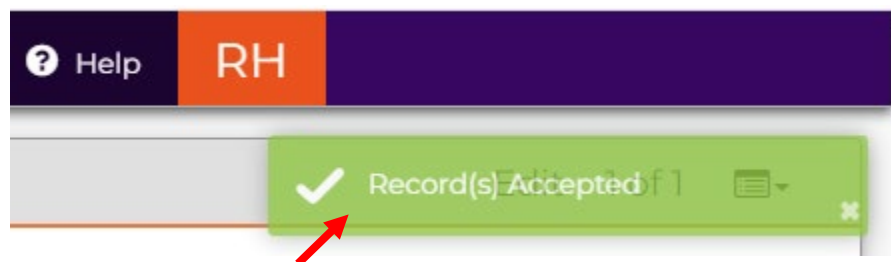
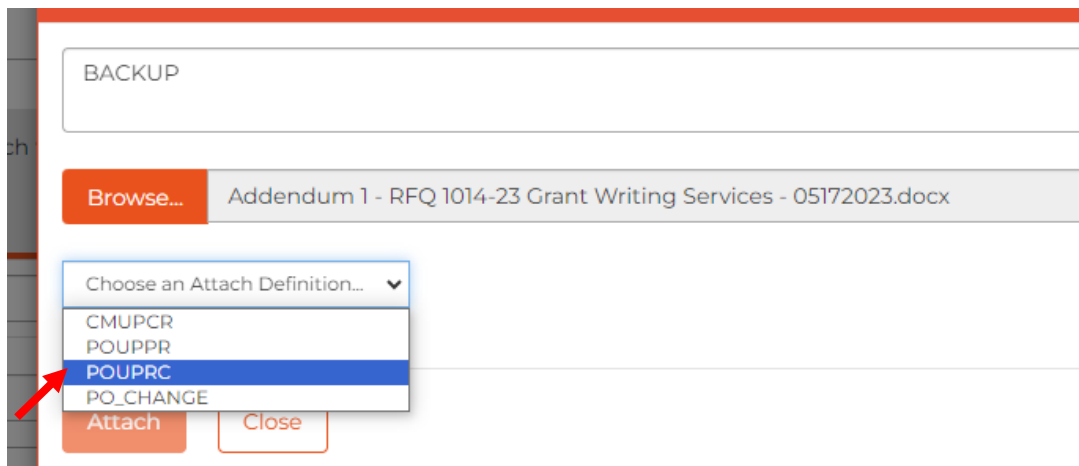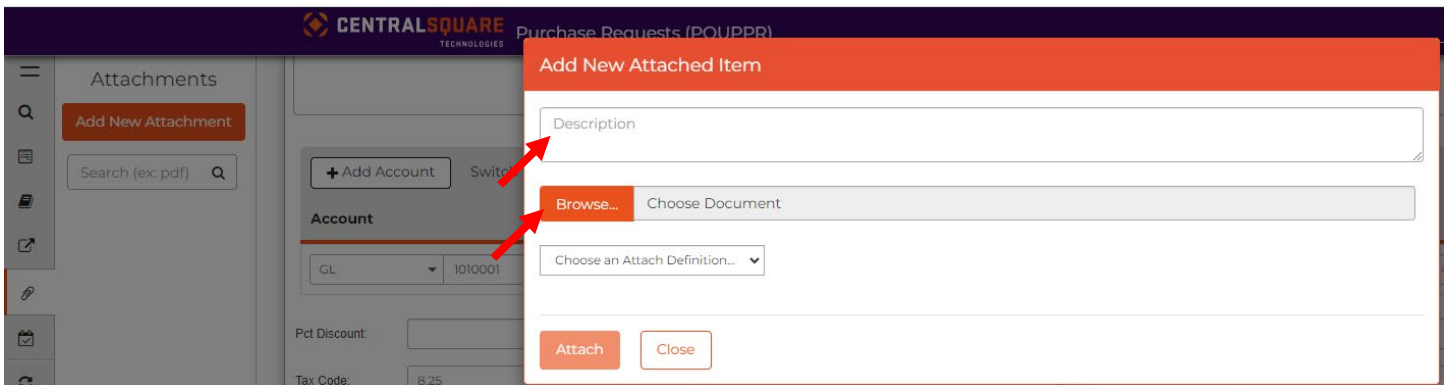Click the "Add New Attachment" button to add documents.
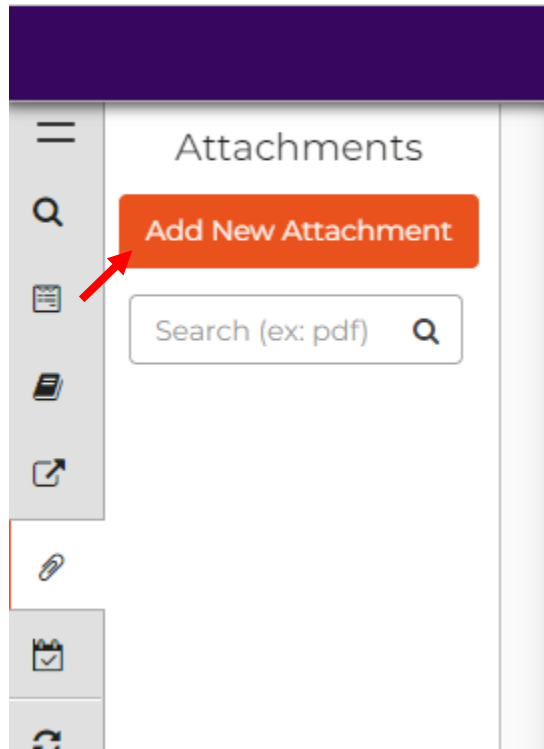
In the description field type in a description that best describes the document you are attaching. Then click the "Browse" button. Then click the Choose an Attach Definition, select the 3rd one, POUPRC, ALWAYS, do not select any other one.

Save changes, click in the green Record(s) Accepted box,

Your last step will be to approve the new Purchase Request (PR). Go back to your Home Workspace, see below.

Under the Tasks Section, you will see the new PR number, in this case the number is 155027. You are able to click on the

Select button on the right side . Once you click on it the button will turn green, then click the green box below to approve the PR. Purchase Request has been completed.